Lawyers Title INSURANCE CORPORATION

Commonwealth LAND TITLE INSURANCE COMPANY

Letter TRAX

ON

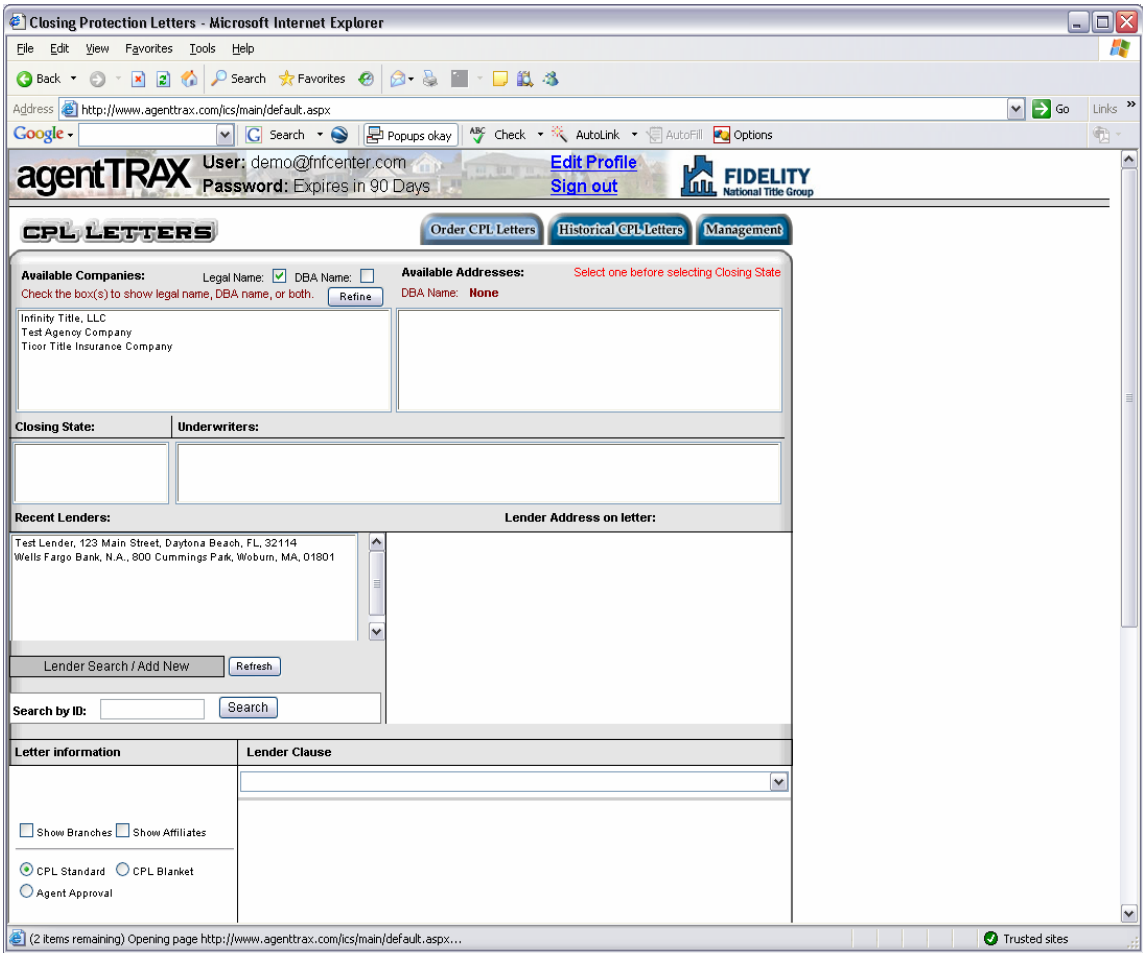
Agent TRAX

Letter Trax User Manual

1. **Login to agentTRAX by accessing the website at: www.agenttrax.com**

2. **Select the agentTRAX letterTRAX Icon located towards the center of your screen.**

3. **You will then be directed to the full page of CPL to create your letter.**

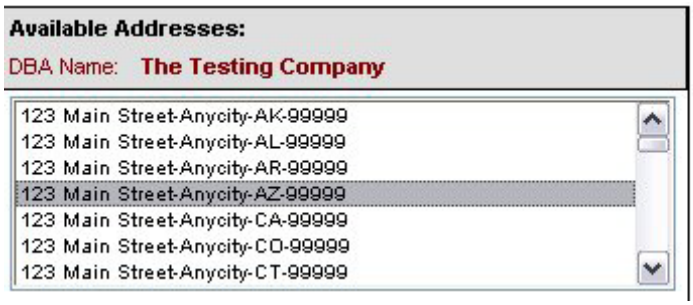


Steps to navigate through the Order CPL Letters screen:

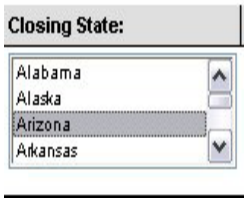
1. **If you have more than 50 available companies, the top left corner of the screen will operate as a search engine. Enter data into any of the applicable fields. Click "Search" to find your company. The more fields that are entered the narrower the search results.**

2. **If you have less than 50 available companies in your selection, your screen will default to the below. Select the applicable agent/attorney office name in the "Available Companies" list. You have the ability to issue the CPL using the Legal name and/or the DBA name by selecting the "Legal Name" and/or "DBA Name" check boxes.**

3. **If you need to run a new search for the company name, select the "Refine" button. Select location under "Available Addresses". Note: If the agent/attorney has a DBA, the name will be displayed under the "Available Addresses" label.**

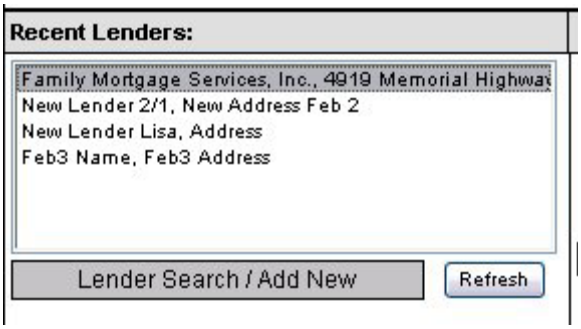


4. **Select the State the property is located in the "Closing State" section.**

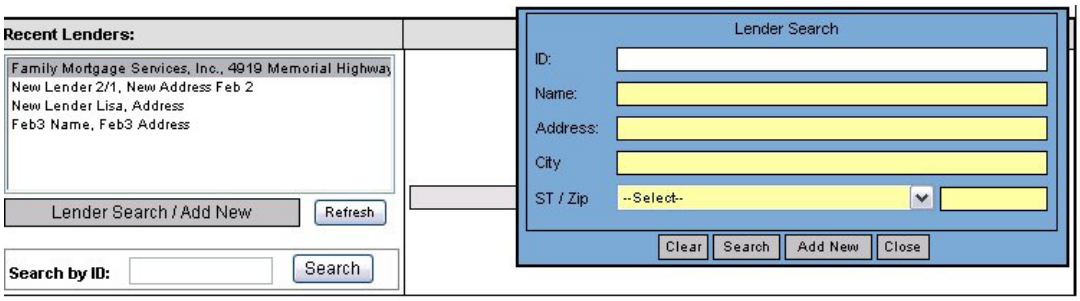


5. **Select the appropriate Underwriter from the "Underwriters" section.**

6. **The "Recent Lenders" section displays your most recently used lenders. You can select a lender from this list by clicking on the lender name or you can search the database for a lender and/or add a new lender to the database. To search or add a lender, refer to "steps f & g".**

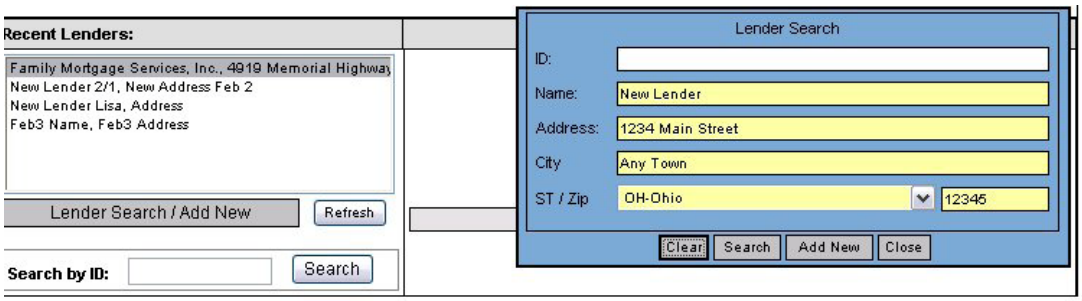

Recent Lenders:
Family Mortgage Services, Inc., 4919 Memorial Highwa
New Lender 2/1, New Address Feb 2
New Lender Lisa, Address
Feb3 Name, Feb3 Address
Lender Search / Add New
Refresh

7. **To search for a lender, click the "Lender Search/Add New" button. If there is data in the pop-up display, click the "Clear" button to clear the fields. You can search by the lender ID, lender name, address or zip code using full or partial information. For example, if you want to search for Test Lender Bank, you can key in the word lender' and click the "Search" button. The search modal will close and your results will display all entries containing the word "lender" in the "Recent Lenders" section.**



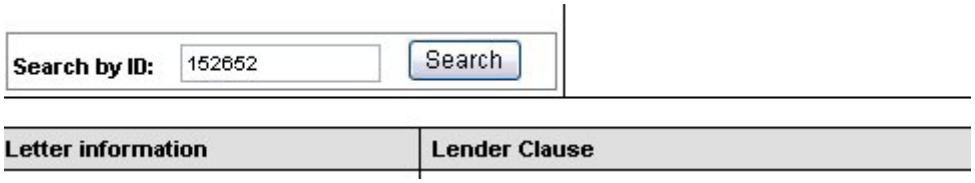
8. **If you want to search by City or State, you must include either the lender name, address or zip code.**

9. **To add a new lender, click the "Lender Search/Add New" button. If there is data in the pop-up display, click the "Clear" button to clear the fields. Enter the new lender information in the fields provided then click the "Add New" button. Once you have clicked the "Add New" button, a new lender ID will be assigned to the lender information.**



***Note: All fields must be completed in order to save as new except the lender ID field which is for searching ONLY*.**

10. **You may also search by the lender ID by entering the lender ID in the "Search by ID" field then clicking the "Search" button.**



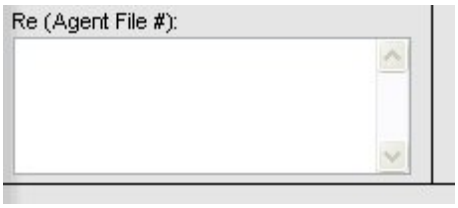
11. **The "Letter Information" section gives you the option to list the branches and/or affiliates within the same state as the property on an attached Exhibit A page by checking "Show Branches" or "Show Affiliates" or both.**

12. **The Letter Information section also displays the "CPL Standard" and "CPL Blanket" radio buttons and defaults to the "CPL Standard". If the closing property is located in a state (Louisiana only) that allows Blanket CPLs, you will then have the option to select the "CPL Blanket" radio button. You will also have the option to select a letter of good standing if "Agent Approval" is selected.**

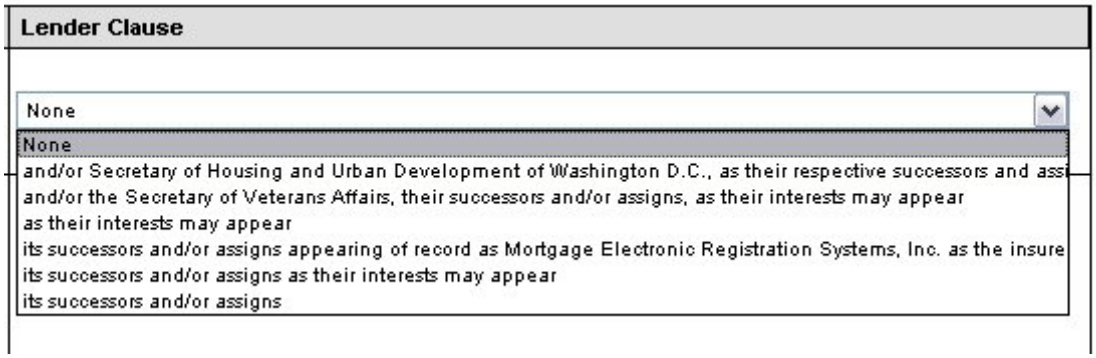
13. **Enter the person(s) to whom you are addressing the CPL to in the "Attention" field.**

For example, Jane/John Doe, or Closing Department. (This field will allow up to 30 characters.)

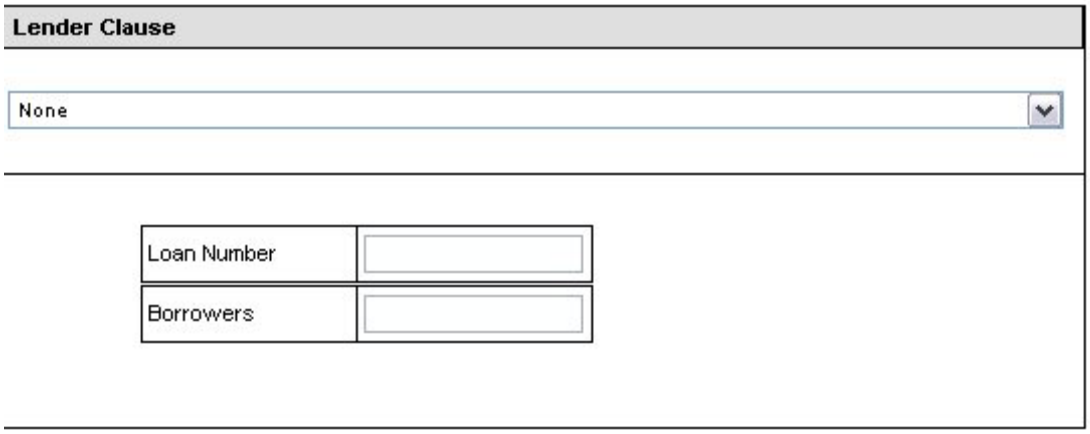
14. **The "Re (Agent File #):" field can be used to enter your file number and/or property address. There is no limit of characters in this field.**



15. If applicable, select an available lender clause from the list provided in the "Lender Clause" section by clicking the down arrow on the right of the clause field, then click on the clause you wish to use. The clause defaults to "None".

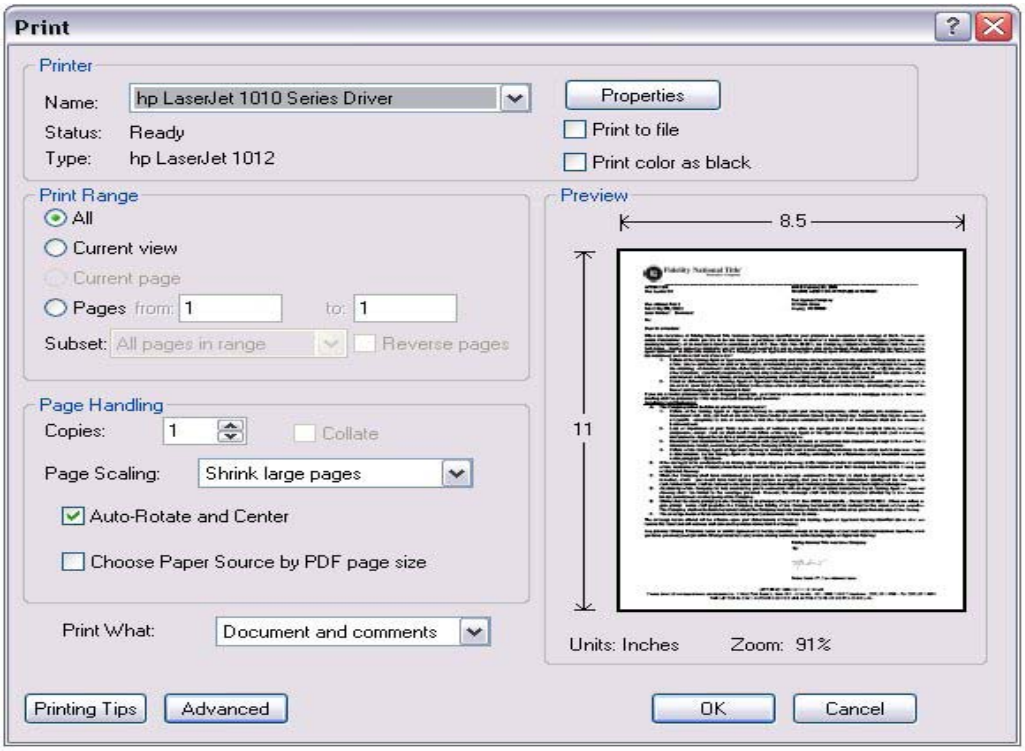

Lender Clause
None
None
and/or Secretary of Housing and Urban Development of Washington D.C., as their respective successors and assi
and/or the Secretary of Veterans Affairs, their successors and/or assigns, as their interests may appear
as their interests may appear
its successors and/or assigns appearing of record as Mortgage Electronic Registration Systems, Inc. as the insure
its successors and/or assigns as their interests may appear
its successors and/or assigns

16. If the letter for your closing state requires additional information, fields will appear beneath the lender clause. Additional fields may vary depending on Closing State and account access. See example below.

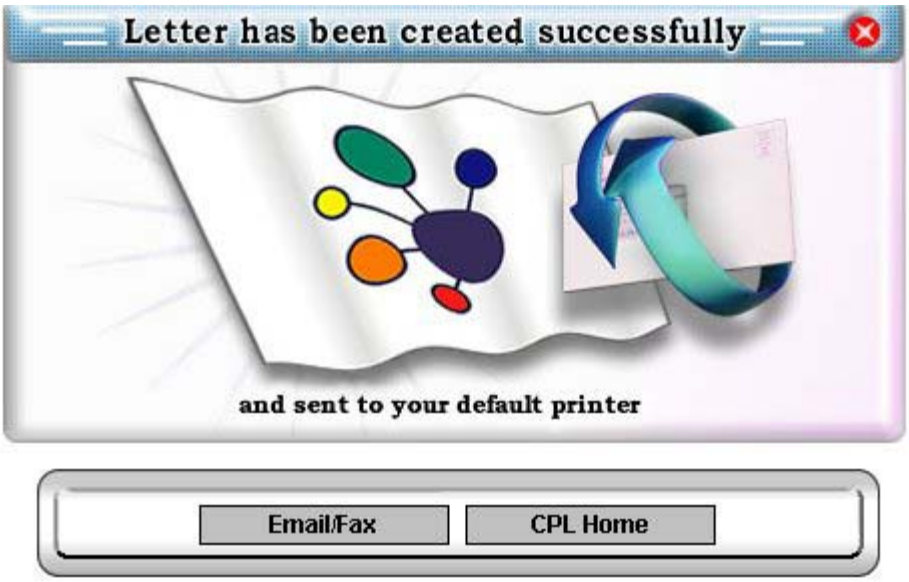


17. **The "Action" area refers to how you wish to distribute your CPL Clicking the "Reset form" button will clear ALL the letter information on the screen. Click the "Create Letter" button to print, fax and/or email your CPL.**

18. **If the "Create Letter" action has been selected the Adobe print dialog box will appear. Verify the printer settings and/or select the options that you need then click the "OK" button to print to your default printer.**



19. **After the letter has been printed, if you would like to email or fax your CPL, click the "Email/Fax" button. If you would like to create a new CPL click the "CPL Home" button.**



20. **The action will default to the "Email" check box in the "CPL Distribution module". Enter the lender email address in the "Lender Email:" field. If you wish to copy this to an additional party, you can enter an email address in the"Cc:" field. Multiple email addresses can be entered into either field; separate each address by a semi-colon (;). Your email address of your account will automatically appear in the "Reply Email:" field. The "Message:" section contains the default text of "Please find attached the CPL letter that you requested". You can add to this or delete it and enter your own message.**

To fax your CPL please be sure to select the "Fax" check box. The "Recipient" line defaults to the Lender name. You will be able to remove this name if desired and complete the other available fields. The "From"

field defaults to the name on your user account. Select the "Send" button once all applicable fields have been entered.

Note: You can fax and email simultaneously if both actions are selected.

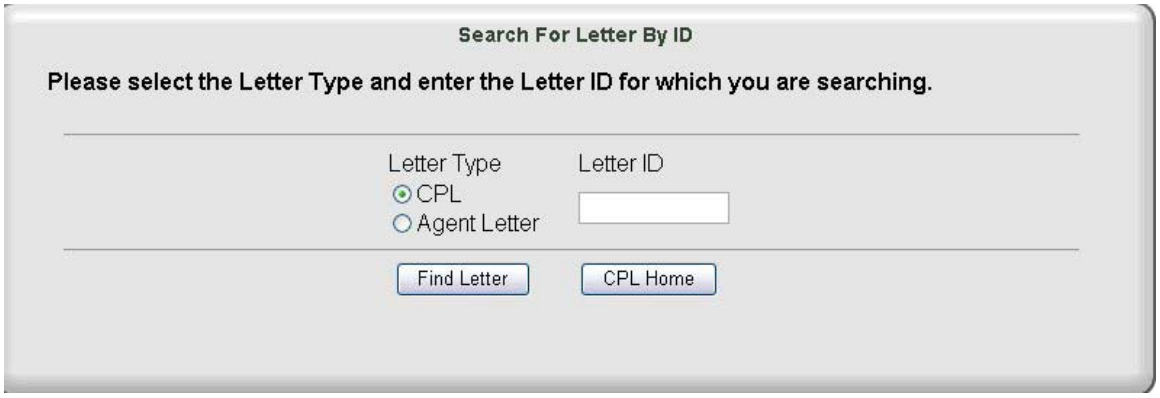
Steps to navigate through the Historical CPL Letters screen:

21. **Historical letters are CPL's that have been created from this site that you can access to view, eprint and/or email.**

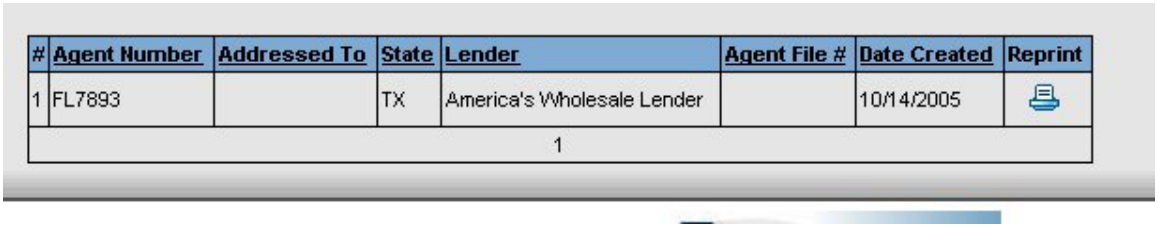
22. **Click the "Historical CPL Letters" tab.**

23. **To search by letter ID, you can click the "Search for Letter By ID" link listed at the top of the page. The letter ID can be found on the footer of the original CPL.**

24. **Select which type of letter you would like to retrieve, "CPL" or "Agent Letter" (letter of good standing), by selecting the applicable radio button. Enter the letter ID and click the "Find Letter" button.**

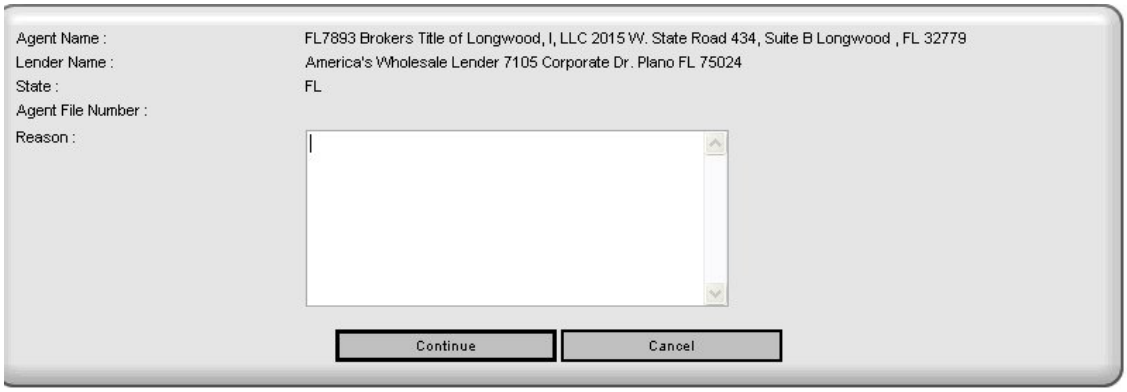


25. Select Reprint icon on the far left the reprint the correct letter.



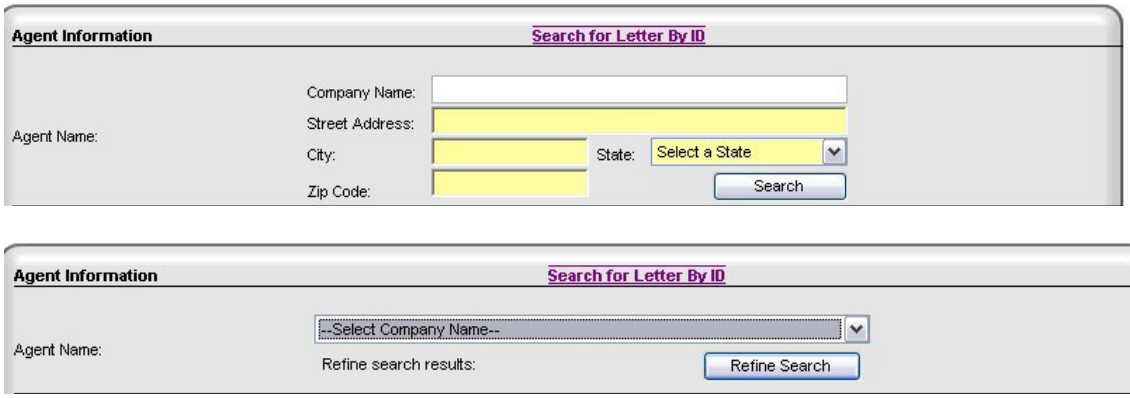
#	Agent Number	Addressed To	State	Lender	Agent File #	Date Created	Reprint
1	FL7893		TX	America's Wholesale Lender		10/14/2005	
				1			

26. The letter information will display at the top of the page. You must provide a reason to reprint , email or fax the CPL in the "Reason" box provided. You cannot make any changes to the letter. Enter your reason in the field provided and click the "Continue" button or "Cancel" to cancel and return the Historical CPL Letters search page. You will be directed through the Adobe print dialog box and email/fax functions to perform the applicable action.


Agent Name :
FL7893 Brokers Title of Longwood, I, LLC 2015 W. State Road 434, Suite B Longwood , FL 32779
Lender Name :
America's Wholesale Lender 7105 Corporate Dr. Plano FL 75024
State :
FL
Agent File Number :
Reason :
Continue
Cancel

27. To Search by the company name, you will have access to Search for the company if you have access to more than 50 available company names in your user account (image I.) If you have less than 50 available

companies, select the company name from the Agent Name drop down menu (image II). If you would prefer to search the company name and have less than 50 in your account, you can do so by clicking the "Refine Search" button.



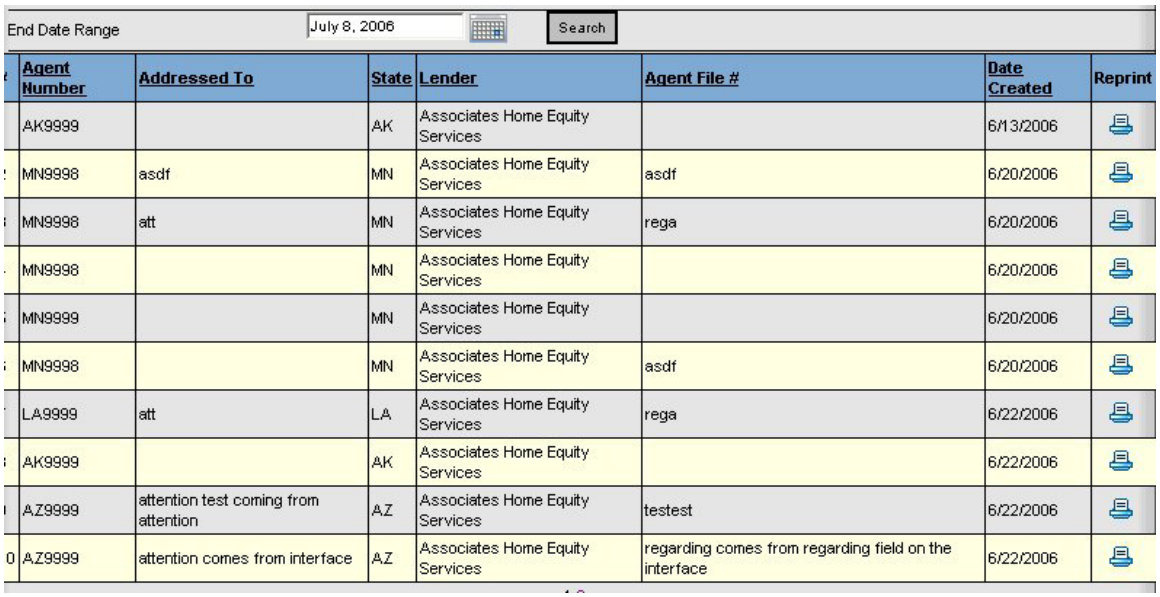
Note: The Agent name field is the only required field to run a historical search.

28. **Select the Underwriter from the provided drop down menu.**

29. **A "Lender Name (optional)" field is provided for you to narrow your search results by entering the Lender Name.**

30. **Select the "Begin Date Range" and the "End Date Range" to search for CPLs created within that date range. You can enter the date using the mm/dd/yy format, or click the calendar icon to the right of the field.**

31. **Click the "Search" button and the search results will return in a grid below.**



Agent Number	Addressed To	State	Lender	Agent File #	Date Created	Reprint
AK9999		AK	Associates Home Equity Services		6/13/2006	
MN9998	asdf	MN	Associates Home Equity Services	asdf	6/20/2006	
MN9998	att	MN	Associates Home Equity Services	rega	6/20/2006	
MN9998		MN	Associates Home Equity Services		6/20/2006	
MN9999		MN	Associates Home Equity Services		6/20/2006	
MN9998		MN	Associates Home Equity Services	asdf	6/20/2006	
LA9999	att	LA	Associates Home Equity Services	rega	6/22/2006	
AK9999		AK	Associates Home Equity Services		6/22/2006	
AZ9999	attention test coming from attention	AZ	Associates Home Equity Services	testest	6/22/2006	
AZ9999	attention comes from interface	AZ	Associates Home Equity Services	regarding comes from regarding field on the interface	6/22/2006	

32. You can sort the results in the order of any of the column headings by clicking the column label. For example, to sort by lender name, click "Lender". Click once for ascending and a second time for descending order.

33. To reprint and/or email the CPL click the printer icon on the far right of the row.

34. The letter information will display at the top of the page. You must provide a reason to reprint email and/or fax the CPL in the "Reason" box provided. (Refer to Step 4biv.)

35. Click the "Continue" button or "Cancel" to cancel and return the Historical CPL Letters search page. You will be directed through the Adobe print dialog box and email/fax functions to perform the applicable action.

Steps to managing your letterTRAX access:

36. Select the "Management" tab located at the top of the page if you wish to add/remove access to Approved Attorneys (if available in your closing state(s).

37. **To manage access to Approved Attorneys click the "Show Approved Attorneys" check box to add or remove the check mark. After your selection has been made, click the "Submit" button to save your settings. The "CPL Home" will take you back to the CPL creation screen.**

Manage your personal preferences:
Check the box below to set whether or not to display Approved Attorneys in the company list on the CPL home page.
Show Approved Attorneys
Submit
CPL Home

Steps to navigate back to the agentTrax home page:

38. **To navigate back to your agentTRAX Home Page, click anywhere in the agentTRAX title bar at the top of the page.**

If you have any further questions feel free to contact the agentTRAX Help Desk at 800.586.0031 or email fnfcenter@fnf.com.
www.agenttrax.com
agentTRAX letterTRAX V4.1-July 2006